MSC System Update Spring 2019

New Libraries

Welcome Medicine Spring Library and Lewis & Clark Library! You may see them in the Library drop-down menus as BFCC and LEWIS-AUG, LEWIS-BKM, LEWIS-EHB, LEWIS-HLN and LEWIS-LIN.

BFCC added 9,110 bib records that did not match on load. LEWIS had roughly 54,000 bib records that did not match on load. This is not unexpected as they are a very large library. These have been marked with an Item Cat 5 of Review. Many of them are duplicate records because of our attachment rules. The migrating libraries will be cleaning up and evaluating duplicate records. Please copy catalog with care.

New Help Center & Knowledge Base

The Library Development Division (LDD) of the Montana State Library released a new help center and knowledge base platform on March 1st. Libraries are able to create accounts to track current and past tickets with the MSC and other LDD departments (Consulting, ASPeN, Montana Memory Project, MontanaLibrary2Go, Montana Courier Alliance, OCLC group services). The help center is context sensitive and will suggest knowledge base articles based on ticket subjects and departments.

In addition to being more user-friendly, the new help center will allow the MSC and LDD to better track statistics about the questions we answer, including topics and time to completion across organizations, library types, and Federations.

To date, this project has taken 266.5 staff hours.

View the [Knowledge Base](#) and open new tickets [here](#).

Please review both the [MSC Support Procedures](#) article, which details how MSC staff prioritize tickets, and the [Submitting a Ticket](#) article. To help us resolve your tickets in a timely manner, make sure to include the following information when applicable:

- Examples with patron IDs, item IDs, or title control numbers instead of personal names;
- Dates and times (e.g. first occurrence and issue persistence);
- Scope (e.g. does this issue impact your computer, library, sharing group, consortium?);
- Baseline technical details (e.g. device / product being used, operating system, browser, URL);
- What you've already attempted to resolve the issue;
- Steps you used so we can replicate the problem – avoid deleting the report, hold, etc., that's giving you trouble, otherwise it's difficult to troubleshoot.

MSC system administrators are committed to ensuring that our help center authenticates users that are authorized to make decisions on behalf of each library. Therefore, if new ticket accounts are created by library staff that are not in ASPeN, system administrators will reach out to the library director/teacher librarian/administrator listed in ASPeN. Though this extra step takes time it is essential to ensure that we do not give out passwords or other sensitive data to the wrong parties. Please keep your library's ASPeN records up to date.

Security

MSC system administrators have apprised the Executive Board on issues pertaining to the MSC's need to secure Personally Identifiable Information (PII) between our WorkFlows Clients and the SirsiDynix SaaS servers in Atlanta. MSC system administrators are investigating a Virtual Private Network (VPN), which is essentially a secured tunnel of only SirsiDynix traffic from each workstation to SaaS. MSC system administrators are committed to working with SirsiDynix to find the best solution for members, especially for those libraries that may not have local IT support.

MSC system administrators recommend removing PII from the system wherever possible. If your library does not need dates of birth, phone numbers or addresses, we can remove that data in batch with API. We recognize that many libraries need this information and we will not be removing it unless requested, however, Social Security numbers and Driver's License numbers will no longer be retained.

Technical Services

Unicode Update Completed!

From 28-29 January, the MSC's Symphony server was successfully migrated from our previous server supporting only ASCII characters to the new server supporting Unicode characters. MSC system administrators are currently considering CMC recommendations and researching Enterprise display options for the additional Unicode fields.

To date, this project has taken 19.5 staff hours.

OCLC Reclamation & Cleanup

MSC system administrators have been working with OCLC to schedule a reclamation project for the entire MSC's holdings in OCLC because we know that several libraries have inaccurate holdings represented in WorldCat.

The number of records needing to be cleaned up is substantial (~120,000), but the process of the reclamation will allow these records to be returned from OCLC after the reclamation with OCLC control numbers, thereby aiding cleanup efforts. MSC system administrators will be designing a cleanup project to properly update as many of these sub-standard records as possible through automated processes. Remaining records needing cleanup will be assigned to the creating library to update where needed.

The Reclamation is tentatively scheduled with OCLC for June 5th. Cataloging in the MSC will not be interrupted but OCLC holdings will be inaccurate for up to 90 days following the reclamation. Your libraries' holdings will not be removed, but they will not entirely represent all holdings.

Lewis & Clark Library's holdings will not be included in the reclamation, as they have been attaching OCLC holdings locally until migration into the MSC. Ongoing holdings will be reconciled going forward as part of the monthly uploads and discards process to OCLC.

Cleanup efforts will begin in the late summer/early fall. Training materials will be available for all members needing to assist in clean up of MSC records.

Going forward, after the reclamation, MSC system administrators are working to develop a discard procedure that will allow proper tracking of holdings in WorldCat for those libraries that continue to

discard improperly. These changes should prevent the need for future MSC-wide reclamations and catalog cleanups.

Compliance Intervention Procedure

The bibliographic standards non-compliance part of the policy cannot be enforced until after the reclamation. MSC system administrators will begin constructing reports to assess record standards compliance in mid FY2020.

MSC system administrators compiled data from FY2015 to FY2018 and identified libraries with greater than median (12) bibs to items, meaning that for every 100 items added they brought in 12 records from SmartPort. That sounds like a very low number, but when excluding those special, academic and large libraries (Billings, Bozeman, ImagineIf and MSLA that bring in ~50% of all records each year) the majority of libraries fall within range of the 12 ratio. Even the larger libraries have ratios no greater than 39, meaning that though most of the records originate with the larger libraries, their catalogers and bibload reports still found a match already in the system over half of the time.

Only FY2018 and FY2019 data will inform compliance intervention. For FY2018 data there were 4 libraries that were above 20 bibs added for items and 16 with ratios between 15 and 20. Only one of these 4 libraries had a ratio above the large publics. It was 64 bibs to items, meaning that for every 100 items added to the catalog, 64 of them had a new bib record brought in through SmartPort. Other libraries of the size and type of this library tend to fall between ratios of 1 to 13, demonstrating that most other libraries are finding the records that they need without having to use SmartPort.

All other libraries besides these 20 are either exempt or at/below median. The policy states that anyone above median can be flagged for compliance intervention, but only the 4 above 20 will be examined this year. One of the four is likely to be above 20% because of special collections, and two others are likely mis-cataloging equipment. Those libraries with ratios between 15 & 20% will be notified and given an opportunity to clean up duplicate bib records if they so choose. Libraries below 15 will not be considered.

MSC system administrators are committed to preserving the anonymity of libraries needing intervention. Any MSC library wishing to know where they fall can open a help desk ticket and request guidance on attachment rules non-compliance whether or not they have been identified as needing intervention.

Since the Fall members meeting, this project had taken 8 staff hours.

Acquisitions Pilot

In order to go live with pre-processing in early 2019, Missoula Public began working with MSC system administrators to map API changes and configure holding codes. There policy changes are live and actual go live with pre-processing through Baker & Taylor is in final testing. ImagineIf libraries will have their policies conformed to the Policy Decisions using API and changes to their holding codes in advance of the fiscal year turn over, exact date to be determined. Other Pilot libraries wishing to conform to the Policy Decisions can request API changes at any time via the ticket system. MSC system administrators would be able to begin work after the start of FY2020.

Pilot libraries not implementing pre-processing are not obligated to request that their policies be conformed to the Policy Decisions, but they may opt in if they would like to use the new policies. Since the Fall members meeting this project has taken 94 staff hours and is nearly completed.

Functional Descriptive Categories - NEW

For libraries wishing to use the adapted Acquisitions Pilot Policies in non-Acquisition libraries, MSC system administrators have created the Functional Descriptive Categories.

Please view the [Functional Descriptive Categories](#) article for a complete list.

The Functional Descriptive Categories were designed to work in any library type regardless of Dewey/LC or genrefied shelving and to describe loan behavior of the item while preserving important statistical categories like format, audience, genre for both sharing group and non-sharing group libraries. Any MSC library can be quickly mapped to these categories without having to change spine labels. The categories also line up with all data points for Public Library Statistics. Libraries implementing these categories will get a new Cat Map and retroactive API changes on a first come first serve basis beginning in September.

Please open a help desk ticket if you are interested or have questions.

Mobile Apps

SirsiDynix ceased development on the legacy product BookMyne. With changes in web services and BLUEcloud Central, we will experience a growing number of issues that will impact user experience. The MSC system administrators are exploring options available to the consortium including BLUEcloud Mobile, SirsiDynix's new app.

Enterprise

Enterprise Reports

In January 2019, we began importing Google Analytics statistics into BLUEcloud Analytics. The data is displayed in a dossier with a chapter for each month. Accessible to all MSC libraries, the dossier includes statistics about sessions, searches, search terms, and users. To help inform collection development decisions, we included a word cloud for the top 500 search terms. As we collect more data, we plan to display summary reports encompassing whole fiscal years so that you can demonstrate online catalog use to library boards and other stakeholders.

Staff spent 47 hours laying the groundwork for this project. Ongoing time will include the data cube monthly update.

Online Fine Payment

MSC system administrators invited a small group of libraries to pilot online fine payments via My Account in Enterprise. If the pilot is successful, the MSC will introduce fine payment as an included, "opt-in" service beginning this summer. MSC system administrators prepared documentation that outlines library and technician responsibilities which can be found on the [knowledge base](#).

With the introduction of online payments, you may occasionally notice new payment types when looking at paid bills in WorkFlows. Web services logs the payment library as the original bill library regardless of which Enterprise site is used to pay the bill. To account for this process in sharing groups,

we added unique payment types for each participating library. Payment types will display in WorkFlows as WEB followed by a dash and the first four characters of the library's policy (e.g. WEB-BELG). Online payment types are excluded from Daily Cash Reports in BLUEcloud Analytics. Reports for online payments can be generated using a separate BCA template, "Enterprise Payment Report."

To date, staff spent 45.5 hours on this pilot. Additional hours will be necessary for evaluation and consortium deployment.

Development
Responsive design continues to be on our radar but behind on production. SirsiDynix pushed back their release date for the next upgrade, which will include mobile friendly pages, until late spring/summer. After release of 5.0.1, we will evaluate the update on our test server before installing on production.

Display Codes
Display codes are the various labels used to describe libraries, shelf locations, item formats, categories, and facets within Enterprise. We recently enhanced our MARC map to distinguish between DVD and Blu-ray formats and adjusted the display codes to match. Prior to this addition, the system displayed all VIDEOREC items as the format "DVD or Blu-ray." We will work with the Content Management Committee to evaluate other Enterprise display codes for inclusivity and patron friendliness.

Enterprise Menu
Libraries can review the full range of possibilities in Enterprise using a new Enterprise Menu available on the MSC knowledge base (see Enterprise – Profile Options). If there is a feature that you see that you would like to add to your site, please open a help desk ticket.

System Reminders
Assumed Lost/Process Long Overdue
MSC system administrators rolled out the Assumed Lost and Process Long Overdue reports for all libraries as part of our preparation for the migration to Saas in 2017. Now that both of those processes have been up and running for a while, we would like to revisit them to see if there are any adjustments that can make them more functional and useful for you. If you're interested in working on a sub-committee to investigate this and assist with developing maintenance standards for long overdue items, please open a help desk ticket.

Barcode Standards and Requirements
MSC system administrators are seeing a rise in non-standard user and item IDs, including randomly typed short strings of characters used as placeholders. These cause issues with various system processes and should NOT be used. Montana Shared Catalog Item and User Barcodes need to be 14 characters long and all numbers. Special non-digit barcodes for system uses like ephemeral must contain no spaces and no symbols except for hyphens. If you need an ID for something that cannot be barcoded, use AUTO so the system can auto-generate a number that follows system requirements.

COSUGI Update
MSC system administrators attended the Customers of SirsiDynix User Group, Inc. (COSUGI) conference in March. In addition to meeting face-to-face with SirsiDynix consultants and product leads to discuss

our needs and concerns, the team attended training sessions offered by library systems, consortia, and developers. Topics included privacy and security; BLUEcloud (web-based) ILS products; analytics and reporting; usability testing; electronic resource management; and API. Staff members attended "hackfests" for Enterprise, BCA, and API where they were able to share with and learn from library peers.